



DELAWARE VALLEY GRANTMAKERS

The Region's Forum for Philanthropy

GRANT APPLICATION GUIDELINES

Developed by Delaware Valley Grantmakers, foundation and nonprofit professionals to streamline the grantwriting process.

IMPORTANT NOTE! READ THIS BEFORE APPLYING

This form is designed to guide applicants through some of the typical questions asked on a grant proposal form, and may be used as a basic template to organize thoughts and consider strategies. A list of those grantmakers who accept this form as a complete application is located on the back of the Application Cover Summary. See the Application Checklist included in this packet before submitting applications.

DO YOUR HOMEWORK! USE THESE TIPS AND TOOLS

- **Communicate with funders.** Contact each funder to obtain a copy of funding guidelines, deadlines and/or annual report. Be aware of each funder's preferred method of initial contact and number of copies of the application you should submit. If in doubt, ask for clarification from the funder.
- **Be strategic.** Make sure that your goals, objectives and amount requested match the criteria of the funder you are approaching. Tailor your application to meet each funder's specifications.
- **Follow the directions.** Write clearly and follow the format of the application closely.
- Do not skip questions unless they in no way apply to your request. Avoid repetition. Less is more!
- Consult the **Regional Foundation Center** at the Free Library of Philadelphia at 215-686-5423 for information about the funders you plan to contact.
- Use the Directory of PA Foundations (call 610-544-6927 to order).
- Use the Pennsylvania Non-Profit Handbook (call 717-238-3787 to order).
- Check the Resources for Grantseekers section of www.dvg.org for a more complete glossary of grantwriting terms.

GRANTWRITING GLOSSARY OF TERMS

TYPES OF GRANTS:

Challenge grant: Funder sets fundraising goal for grantseeker to reach; reward if met.

Capital grant: Funding for endowment purposes, construction or equipment.

General Operating Support: Funding for the general purpose or work of an organization, including personnel, administration, and other expenses for an existing program.

Matching grant: Funder agrees to match amount that grantseeker raises in fundraising.

Project/Program grant: Funding for specific initiative or new endeavor, not general purpose.

Technology grant: Funder donates technological equipment (computers, phone system, etc).

TERMS USED IN APPLYING:

Budget: The financial plan for your grant, itemized to show breakdown of both income and expenses.

Consultant: A professional who is not on-staff but who lends periodic expertise.

Contract: A legal document that specifies work/services provided as part of grant.

Dissemination: Distribution of results or information to others.

Evaluation: Qualitative and quantitative assessment of project. Did you meet your goals?

Goals: The broad outcomes expected from project. Unlike objectives, not directly measurable.

Objectives: Specific, measurable aims for project, with matching outcomes to measure them.

Outcomes: Expected results of project that can be used to measure its success.

Form updated July 2005

GRANT APPLICATION COVER SUMMARY

Complete this form by either filling-in the information on this sheet or by reproducing the form exactly. Listed on the reverse are those grantmakers who accept the Common Grant Application and Common Report Forms, either in whole or in part, as official application forms.

1. **Legal Name of organization:** _____
Address, Telephone and Fax: _____

Email address: _____ Web address: _____
Name and title of Contact Person: _____
Name of Executive Director: _____
Name of President of Board: _____
Federal ID number: _____
2. **IRS 501(c) (3) nonprofit? Please circle: YES NO**
If **Yes**, please attach copy of designation letter from the IRS.
If **No**, please identify your fiscal agent and attach the written agreement from the fiscal agent.
3. **Amount Requested: \$** _____
4. **Type of Grant Requested** [Operating, Project, Challenge, Matching, Technology, Capital]:
5. **State Your Organization's Mission** (2 Sentences):
6. **Summarize the proposal and its strategic link with this funder**, including the **name** of the project or the capital campaign, if applicable (4 Sentences):
7. **List the Proposal's Target Population, Constituents, and Geographic Communities:**
8. **Total number of organization's Board Members:** _____
9. **Total number of organization's Employees:** Full Time _____ Part Time _____ Volunteer _____
10. **Total annual organizational budget: \$** _____ **Dates of fiscal year:** _____
11. **Project or capital budget (if applicable): \$** _____
12. **Time period this grant will cover:** ____/____/____ to ____/____/____
13. **Does your organization receive support from United Way, Combined Health, Arts Council or any other federated funds? Please circle: YES NO**
If **Yes**, percentage of total operating budget supported by federated funds: _____%
14. **List previous support from this funder in the last five years, purpose, amount and date:**

15. **Signature of Executive Director:** _____ **Date:** _____

GRANT PROPOSAL NARRATIVE

*Please provide the following information in this order.
Do not use more than 5 pages, exclusive of attachments.*

I. Organizational Information

1. Brief Summary of Organization's history and mission.
2. Description of current programs, activities, service statistics and strengths/accomplishments (highlighting the past year), including what makes your organization unique.

II. Purpose of Grant

1. If applying for **general operating support**, please explain your need for support and also the impact this support will have. Please see "Attachments" (below) regarding requests for financial information.
2. If your request is for a specific **project, program, challenge, matching, technology or capital grant**, please provide the following information:

Needs and Capabilities

- The situation—opportunity, problem, issue, need, and the community—that your proposal addresses, and how that need was determined.

Goals and Activities

- Your goals and objectives.
- Specific, measurable activities to accomplish these objectives.
- Who will carry out those activities (if this is a collaboration, briefly describe the partners).
- Timeline in which all of this will take place, with specific start/end dates.
- If applying for technology, what is your plan for managing the technology? (Include backup/maintenance, potential for growth/upgrades, staff training, use of consultants, etc.)

Impact of Activities

- How the proposed activities will impact the designated community or population.
- How you will measure the results, and how the results will be used, disseminated, or publicized.
- How you plan to sustain the project after the funding period has expired.

III. Attachments

1. Financial Information

For **ALL grants**, please submit the following information:

- Organization's annual operating budget and actual income and expenses for most recently completed fiscal year **AND** for current year-to-date.
- Itemized budget for how this specific grant will be used. Identify each source of revenue, the amount, and whether funds are either committed or pending. If request is for a multi-year grant, include multi-year program budget. (If desired, use attached Sample Budget Form.)
- Organization's most recent **AUDITED** financial statement (if budget greater than \$100,000) or Form 990 (if budget between \$25,000 and \$100,000). If neither document is available, include unaudited financial statement.
- Organization's three (3) largest funders in the last fiscal year and type of grant.

2. Other Supporting Materials

- Latest annual report or summary of the organization's prior year activities.
- Current board list with members' employment affiliations, constituencies, and years served.
- One-paragraph description of key staff, including qualifications relevant to this request.
- Grantee report (if previously funded).
- Letters of agreement from any collaborating agencies, if applicable.
- Letters of support and/or recent reviews or articles, if available.

GRANT APPLICATION CHECKLIST

DID YOU INCLUDE...

Check Box

- A completed Grant Application Cover Summary with contact information?
 - A copy of the IRS letter confirming your organization's 501(c)(3) status?
 - A completed Grant Proposal Narrative not exceeding five (5) typed pages (excluding attachments)?
 - An itemized annual budget for your organization's current fiscal year, with actual figures for the previous fiscal year?
 - An itemized budget, listing income and expenses, for this specific grant?
 - Your organization's most recent AUDITED financial statement or IRS Form 990?
 - List of three largest funders in the last fiscal year and type of grant?
 - Your organization's latest annual report or summary of the prior year's activities?
 - Current Board list and affiliations?
 - One-paragraph descriptions of key staff and their relevant qualifications?
 - Grantee report (if previously funded)?
 - Letters of agreement from any collaborating agencies (if applicable), and letters of support and/or recent reviews or articles (if available)?
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GRANT REPORT NARRATIVE

Please limit your narrative to 4 pages total. Some questions may not apply to your grant.

If you are reporting on a **GENERAL OPERATING GRANT**, please provide the following information:

- Describe organizational and/or programmatic achievements and setbacks during the grant period.
- Describe significant board and/or staff changes during the grant period.
- Explain how you measured the effectiveness of your activities against your goals and objectives. What have you learned? What would you do differently?
- Please submit actual end-of-year income and expenses for the organization for the year in which the grant was used.

If you are reporting on a **PROJECT, PROGRAM, CHALLENGE, MATCHING, TECHNOLOGY OR CAPITAL GRANT**, please provide the following information:

1. Results

- List the original goals and objectives of the grant, and tell how they were met during this reporting period. Include the impact it made on your organization, community, and/or the population served.
- In what ways did the actual project vary from your initial project plans? Describe how/why.
- Describe any unanticipated outcomes, benefits or challenges encountered with this project, including current status on meeting any special terms of this grant. (For example, if this was a challenge grant, did you meet the challenge?)
- If applicable, attach selected material relating to the funded project: press or news items, brochures, letters of support, photographs, etc.

If you are reporting on a technology grant, provide the following additional information:

- How has the technology improved your communication or management capabilities?
- How has your staff adapted to the new system, and how is the technology being supported?
- What future plans do you have for upgrades or growth of this technology?

2. Lessons Learned

- What are the most important results and lessons you have learned from this project?
- How will you use what you have learned to inform future work?
- What recommendations can you make to funders or others working in this field?
- If you were to undertake this project again, what would you do differently?

3. Future Plans

- What is your plan for this project in the future? Briefly describe rationale for ongoing funding, expansion, replication or termination.

4. Financials

- Using the original budget included with your proposal, provide an itemized budget of actual expenses and income for the project for this period. Provide narrative on any variances of 10% or greater from the original project budget.
- Include a detailed, complete accounting of how the specific grant dollars from this grantmaker were spent, including project financial statement if appropriate. Enclose your most recent audit.
- Who else has funded this project, and at what level?

SAMPLE BUDGET FORM

*This form is to be used as a guideline for writing a budget for a grant application. Some items listed will not apply to your organization or project, and some grantmakers will specify the format in which they would like budgets to be submitted. **As always, contact the grantmakers to whom you are applying in order to find out their specific application requirements.***

INCOME/REVENUE	COMMITTED	PENDING
1. Fundraising Events		
2. Gifts/Bequests		
3. Miscellaneous contributions		
4. Foundation support		
5. Corporate grant support		
6. United Way		
7. Grants/Contracts: Gov't agencies		
8. Program/service fees		
9. Membership Dues/Individual donations		
10. Investment income/transactions		
11. Earned Miscellaneous Revenue		
12. TOTAL INCOME/REVENUE		

EXPENSES	TOTAL EXPENSES	EXPENSES COVERED BY REQUESTED GRANT
13. Salaries of Provider Staff		
14. Fringe Benefits		
15. Professional fees (contract, consultant)		
16. Supplies (consumable)		
17. Printing and Postage		
18. Rent/Utilities		
19. Phone and fax		
20. Travel and Meetings		
21. Training		
22. Evaluation		
23. Equipment Purchases/Rental		
24. Miscellaneous expenses		
25. TOTAL EXPENSES		
26. SURPLUS (DEFICIT)		

Keep in mind...

- If you feel elements of your budget require explanation, please do so in a brief narrative.
- Remember that the budget you submit with your application will be the basis of your financial reporting throughout the grant period (including your final report).

**LIST OF DVG MEMBERS WHO ACCEPT COMMON GRANT APPLICATION and/or
COMMON REPORT FORM
in whole or in part**

*IMPORTANT: Please **CHECK WITH EACH GRANTMAKER**
for funding guidelines, proposal deadlines, and any other application requirements.*

Grantmaker	Phone	Email	Accept CRF?	Website
1675 Foundation	610/896-3868	drowe@1675foundation.org	No	www.1675foundation.org
ARAMARK	215/238-3271	irvin-donna@aramark.com	Yes	www.aramark.com
The Bennett Family Foundation	610/983-9114	tchapin@millcreekcap.com	No	www.bennettfoundation.org
Brandywine Health Foundation	610/380-9080	info@brandywinefoundation.org	Yes	www.brandywinefoundation.org
Chester County Community Foundation	610/696-8211	info@chescofcf.org	Yes	www.chescofcf.org
Connelly Foundation	610/834-3222	vkflaville@connellyfdn.org	Yes	www.connellyfdn.org
Dolfinger-McMahon Foundation	215/979-1768	renz@duanemorris.com	Yes	n/a
Farber Family Foundation	215/569-9900	ekurtzman@aol.com	No	n/a
Samuel S. Fels Fund	215/731-9455	helenc@samfels.org	Yes	www.samfels.org
Fourjay Foundation	215-830-1438	info@fourjay.org	No	www.fourjay.org
Foundations Community Partnership	267/895-1740	rbernstein@fcpartnership.org	No	http://www.fcpartnership.org/
Green Tree Community Health Foundation	215/248-4243	susanhansen@chhcfoundation.org	No	http://www.chhcfoundation.org/
The Grundy Foundation	215/788-5460	ejw@grundyfoundation.com	Yes	www.grundyfoundation.com/
Frank & Marie Hamilton Charitable Trust	215/587-0818	jkaplan@E-ALB.com		n/a
The HBE Foundation	610/688-0143	Bmbrown9999@aol.com	Yes	n/a
Stewart Huston Charitable Trust	610/384-2666	admin@stewarthouston.org	Yes	www.stewarthouston.org/
IBM Corporation	610/578-2258	dmelley@us.ibm.com	No	www.ibm.com/ibm/ibmgives/
Lancaster Osteopathic Health Foundation	717/397-8722	scody@lohfoundation.org	No	http://www.lancasterosteopathichealthfoundation.org/
The Lenfest Foundation	610/828-4510	lenfestfoundation@lenfestfoundation.org	Yes	www.lenfestfoundation.org
The Lida Foundation	215/247-5578	discern@bellatlantic.net	No	n/a
McLean Contributionship	610/527-6330x1	SandraLMcL@aol.com	Yes	www.fdncenter.org/grantmaker/mclean
The New Century Trust	215/735-7593	newcenturytrust@verizon.net	No	
Oxford Area Foundation	610/932-4627	iware234@aol.com	No	n/a
PNC Foundation	215/585-5152	Rebecca.Quinn-Wolf@pnc.com	Yes	www.pnc.com
Prudential	215/784-8147	weston.somerville@prudential.com	Yes	http://www.prudential.com/community/
Quaker Chemical Fdn	610/832-4301	patricia_green@quakerchem.com	No	http://www.quakerchem.com/
St. Christopher's Foundation for Children	267/568-1126	jss@scfchildren.org	Yes	http://www.scfchildren.org
TD Bank	888/751-9000	paula.wengerd@yesbank.com	No	http://www.tdbank.com/communityrelations/
Thomas Scattergood Behavioral Health Fdn.	215/831-3000	cdelgado@scattergoodfoundation.org	Yes	www.scattergoodfoundation.org
Subaru of America Foundation, Inc.	856/488-5099	foundation@subaru.com	Yes	www.subaru.com
Rosenlund Family Foundation	Unlisted	n/a	Yes	n/a
Union Benevolent Association	215/763-7670	info@uba1831.org	Yes	www.uba1831.org
The Vanguard Group Foundation	610/669-6331	tami_wise@vanguard.com	Yes	n/a
Waste Management Inc.	215/428-3255	grush@wm.com	Yes	www.wm.com
Woosnam Family Foundation	215/545-5505	rwoosnam@innovestgrp.com	Yes	n/a

List revised October 2008